

## Project Managers' Advisory Group

### MINUTES May 19, 2008

#### Attending:

( \* = by phone )

Bob Giannuzzi	EPMO
Jim Tulenko	EPMO
Charles Richards	EPMO
Kathy Bromead	EPMO
Linda Lowe	EPMO
Alisa Cutler	EPMO
Barbara Swartz	EPMO
Karen Burke	ITS
Dave Butts*	WRC
Lynne Beck	DHHS DMH/DD/SAS
Joe Cimbala	DHHS DMH/DD/SAS
Cheryl Ritter*	DOT
John Gary	NCCCS
Jim Skinner*	DOI
Gary Lapio*	DHHS/DIRM
David Prince	DOJ
Caroline Jackson	DHHS/DPH
Lucy Cornelius	DPI

**Bob Giannuzzi** welcomed everyone to the meeting. There were no first time attendees.

**Bob** announced that **Subba Bandhuvula** of NCCCS received her PMP certification.

**Bob** solicited and received approval of the April minutes.

**Linda Lowe** reported that Cycle 7 of the EPMO's PMP Exam Prep class had two more classes plus practice sessions. At least three students have signed up to take the exam in June. The EPMO is now accepting names of candidates for the fall sessions.

**Kathy Bromead** reported that the next Public Sector LIG to be held on June 5 will feature a presentation by Jim Dolan of OSBM on business cases and cost benefit analysis. Also of interest (from the NCPMI website):

- The May 28 PMO Committee (LIG) will have Jill Mertens speaking on *A Framework for Technology Evaluation*.
- On June 2, the Information Systems Committee will feature Jackie Podger speaking on *Managing Difficult Project Relationships*.

**Bob Giannuzzi** called for updates from the Task Groups.

- **PM Tools Kathy Bromead** reviewed highlights from her presentation to the TPG (Technology Planning Group – committee of CIOs from large agencies) on 5/16. The migration to MS Project Server 2006 is slated for 3Q08. This will result in a supported PPM tool. With the document management function to be implemented in SharePoint, the question came up as to whether a PPM tool license is required to

view the documents. **Kathy** will follow up. The ITS PMO plans to assess the resource management functionality of MS Project Server.

- **Methodology** **Alisa Cutler** reported that all Gate checklists are available for use. Feedback to date has been positive. The current focus is on revision of the Project Closeout document with Excel functionality. Future activity will include revisions of the Status Reporting Checklist, Procurement Plan and Change Request processes/documentation. **Alisa** solicited input as well as volunteers to serve on the team.

**Bob** passed out the following information on upcoming teleconferences of interest to the PM Advisory Group.

Organization/website	Contacts	Upcoming Calls
NASCIO <a href="http://www.nascio.org/committees/projectmanagement/">http://www.nascio.org/committees/projectmanagement/</a>	Stephanie Jamison 859/514-9148 <a href="mailto:sjamison@AMRms.com">sjamison@AMRms.com</a> <a href="#">Access</a> 888/272-7337 conference ID 6916986	No June presentation
PMO Executive Council <a href="http://www.pmo.executiveboard.com/">http://www.pmo.executiveboard.com/</a>	Register at website	<u>May 21</u> (12:00 PM) <b>Augmenting Project Management Efficiency</b> <b>Leveraging the Project Planner Role</b>
CIO Executive Council <a href="http://www.cio.executiveboard.com/">http://www.cio.executiveboard.com/</a>	Register at website	<u>May 21</u> (7:00 AM) <b>The Last Mile - Managing Change to Speed User Adoption of Technology</b>  <u>May 27</u> (12:00 PM) <b>Quantitative Analysis of the Drivers of Effective IT-Business Relationships</b>
Application Executive Council <a href="http://www.aec.executiveboard.com/">http://www.aec.executiveboard.com/</a>	Register at website	<u>May 22</u> (11:00) <b>Developing the Next Generation Business Analyst</b>  <u>June 12</u> (11:00) <b>Testing Best Practices</b>
Infrastructure Executive Council <a href="http://www.iec.executiveboard.com/">http://www.iec.executiveboard.com/</a>	Register at website	<u>May 22</u> (10:00) <b>Shrinking Footprints, Growing Distances: Architecting for Consolidation and Performance</b>
Information Risk Executive Council <a href="http://www.irec.executiveboard.com/">http://www.irec.executiveboard.com/</a>	Register at website	<u>June 10</u> (11:00) <b>Data Leakage Prevention</b>
Enterprise Architecture Executive Council	Register at website	<u>June 17</u> (11:00) <b>Aligning Enterprise and Distributed</b>

**Kathy Brome** offered to provide a preview of the June Quarterly Change Release of the workflow and PPM process at the next PMAG meeting.

Training was the next topic of discussion. **Kathy** reported that the EPMO needs FY0809 PM training needs so that vendors can be solicited via the RFP process to provide training for the entire year. Feedback is needed by the June PMAG meeting. **John McShane** will send an email request for training needs to PMAG as well as CIO distributions.

**Jim Tulenko** reported on PPM tool activity. Minor enhancements will be implemented in June. The team will then be focused on the migration to MS Project 2006 version. **David Prince** asked if the Document Management data will be migrated to SharePoint, and **Jim** responded that it will. **Kathy** pointed out that the SharePoint front end interfaces with Documentum. **Lynne Beck** mentioned that SharePoint functionality was discussed at the last NCPMI general membership meeting.

Lessons Learned from recently closed projects were distributed and are attached below. Templates for LLs by Phase are available in the PPM tool. **Kathy** would like to have a lessons learned database text search functionality in place. **Lucy Cornelius** pointed out that some vendors are reluctant to provide LLs if not in the contract to do so.

Bob asked the group to share how their agencies do estimating. **Caroline Jackson** offered that at DHHS, their QA is the main resource for estimating.

For the next meeting, **Bob** will try to get feedback on using MS Project 2006 for resource planning or a presentation on business case development.

Meeting adjourned at 3:58.

NEXT MEETING  
Monday, June 16, 2008  
ITS Conference Room 2 or (919)981-5520

# Lessons Learned Documentation

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## Exhibit A

### ITS ISO Vulnerability

1. **LESSONS LEARNED** - What were the positive lessons learned (project strengths) from this effort?
  - Requirements from the beginning were clearly defined.
  - A solid test plan that is based on requirements increases the probability that the system delivered will be successful.
  - Having a representative user base involved throughout the project lifecycle will aid in achieving the correct results/outcomes for the users of the system.
2. **LESSONS LEARNED** - What opportunities for improvements (project weaknesses) were learned with this project?
  - While requirements were clearly defined. Requirements can be too specific and therefore result in a narrow response to a RFP. As a result, other solutions that may be of interest and of higher value may not be given the opportunity for evaluation.
  - Include PM in the project as soon as possible, preferably in the Initiation phase to ensure a higher probability of successful execution by leveraging the PM's experience.
  - The T&C's are too generic and do not apply to all procurement scenarios. As a result, this lengthens the procurement cycle due to negotiations between legal entities on the finalized T&C's. ITS needs different T&C's for software installs versus hardware installs, etc.
  - Get current client contacts during proposal evaluation in order to get their assessment about the product/service offering and more importantly support from the company selling the product/service offering.

## Exhibit B

### DCCPS - DATAMAXX Intellimobile Client Software Implementation

1. **LESSONS LEARNED** - What were the positive lessons learned (project strengths) from this effort?

None due to short time frame to meet purchasing requirements of grant

2. **LESSONS LEARNED** - What opportunities for improvements (project weaknesses) were learned with this project?

SHP needed a project manager to support the administrative requirements and documentation mandates from agency CIO.

## Exhibit C

### DPI - NC WISE Wave 1 deployment

1. **LESSONS LEARNED** - What were the positive lessons learned (project strengths) from this effort?
  - A well-designed data conversion and functionality training process will smooth the deployment.
  - Early notification of conversion problems allowed graduated intervention to overcome obstacles.
  - The Help Desk is massively involved in the conversion and deployment process, supporting the LEAs as they prepare for data lock-down.
2. **LESSONS LEARNED** - What opportunities for improvements (project weaknesses) were learned with this project?
  - Do not use a fixed-price contract for software development projects of this size when customer requirements are not known in advance. Use time and materials for software development.
  - Ensure the fixed-price contract has mechanisms to enforce performance, such as award-fee pools, penalties or liquidated damages.
  - Require a particular software development capability from the vendor, such as CMMI-3.

### Other

The following list lessons learned were recorded from verbal conversations during the weekly DPI/vendor Deployment meetings (specifically from the 3/22/05 and 3/29/05 meetings). The list also includes written data gathered from the various teams represented including PD, WBT, Data, and Readiness. They are presented in no specific order, though all should be taken into account for Waves II and III deployment and mitigated as appropriate.

1. LEAs need help building and modifying their training plan. They are having problems breaking it down into specific tasks because they are unfamiliar with NCWISE. Frequently [the LEA training plan] has to be modified on the first day of training. The plans do not reflect the thoroughness for the TAM that needs to be defined and the strategy for TAM roll out. It was suggested that training plan templates and examples distributed in the GSW may be helpful.
2. HW must be ordered as early as possible so as not to cause delays to Deployment.
3. New eSIS releases should be given time for significant testing prior to install.
4. Network Monitoring software should be installed at all LEAs to avoid failure of any LEA to deploy, and to protect against possibly negative PR for NC WISE.
5. WBTs should be strongly and frequently marketed to the LEAs and a plan should be in place to measure the performance of end users.
6. Data should be checked prior to Conversion by the Readiness team to ensure that the LEA is ready to deploy.
7. Communication with Superintendents and Principals needs to improve; often they are unaware of their deployment schedule, inadequacies in their environments, staff, and/or data.

8. A plan needs to be put into place stating which WBTs must be reviewed prior to training. This plan should specify an order for reviewing the WBTs.
9. A list of LEA tasks should be developed. This list should include timeframes.
10. Training on UERS, reporting hub, creating courses, NDS, and security seem to be weak. We need to walk LEA people through the process the first time. Users also need to know when they have access to certain things. A WebEx to confirm LEAs have things setup correctly would be very helpful.
11. Data managers need better training as to why they would use one tool as opposed to another.
12. There seems to be panic in some LEAs about using EDCAM. Would like to have some time before the GSW to preview EDCAM. A WBT on EDCAM may prove helpful.
13. LEAs are confused about the relationship between NCWISE and CECAS.
14. LEAs have questions about standardized testing and the SAR. They need someone to handle these questions.
15. Trainers should not be put in the field for 5 or 6 weeks without a break.
16. There are many differences between MS and HS schedules and many differences in the scheduling process from one school to another. Can we handle this better using another breakdown or schedule?
17. Labs need to be setup and checked for correct software before the trainer arrives.
18. Trainers that are selected by the LEA may not be trained as a trainer. LEAs must select these trainers carefully to ensure they are qualified and carefully aligned with the material to be covered.
19. End users are not necessarily receiving NC WISE newsletters or emails.

## **Exhibit D**

### **ITS SDC - Voice Services**

Setting up new environments from scratch always takes more effort than anticipated.

Using a Project Manager experienced with the EPMO processes will minimize the documentation and reporting efforts while assuring efficient movement through the processes.

## **Exhibit E**

### **DHHS - Artifacts Review and Update Process (ARUP)**

The Level 1 budget planning originally included cost for SME resources that subsequently were not required, resulting in a positive cost variance. Change requests applied to the budget brought the Project cost variance down to a level commensurate with a Project of this size. (POSITIVE)

The Project Sponsor was very clear in the expectations of the Project, Project staff, and Project reporting process. (POSITIVE)

Customer expectations such as status reporting were well supported and communicated. (POSITIVE).

The EPMO Project approval process guidelines were followed via the PPM tool. This process went very well. (POSITIVE)

Sponsor expectations were clear during this Phase and mainly involved use of the PPM tool in performing the ITS reporting function. (POSITIVE)

Customer expectations were well supported and communicated throughout the Project lifecycle. (POSITIVE)

A Program-Level Risk Management Plan was developed and adapted by the ARUP Project. (POSITIVE)

Issue management was a manual process during this Phase and issues were escalated to the Project Sponsor when applicable. (POSITIVE)

Monthly status reporting was initially a paper reporting process during this Phase. Status reporting via the PPM tool would have been more efficient. (NEGATIVE)

PPM Tool training provided information on how the planning phase can be used more efficiently for resource utilization and planning. (POSITIVE)

The Project planning and schedule were accomplished using MS Project and were fairly straight forward. (POSITIVE)

Requirements mapping was performed by mapping the requirements from the SB991 document to deliverables and milestones inside the MS Project timeline. (POSITIVE)

The Project's change requests added additional goals and milestones without altering the original Business Case intent. (POSITIVE)

The Project approval process was exercised twice for change requests and went smoothly for

a project of this size. The use of the PPM tool greatly assisted the process and the use of the defined (within the tool) approval process. (POSITIVE)

Sponsor expectations were managed at two levels: 1) provide the Project deliverables as expected; and, 2) provide status reporting via the PPM tool. Both of these objectives were met. (POSITIVE)

Customer expectations were managed through the documented processes of declaring deliverables and milestones, and, through the status reporting process. (POSITIVE)

Risk entries were made in the appropriate tab in the PPM tool and appropriate risk mitigation steps were taken. All of the risk affecting areas were identified early and managed to a level that resulted in no impact or minimal impact. (POSITIVE)

Issues management was handled as an interactive process between the ITS project monitoring process and the OMMISS PM, OMMISS QA team and the DIRM QA team. Responses were made to all registered issues before the next monthly reporting period, although there were a couple of occasions where clarity was requested by the PM. This was handled very well by DIRM QA and the EPMO staff. (POSITIVE)

All Execute & Build monthly reporting was handled via the PPM tool. This is a very effective way of performing the status reporting process. (POSITIVE)

All project schedules, milestones, and project planning were done using the MS Project tool and milestones were reported in the PPM tool as well. (POSITIVE)

Resource management in a matrix managed organization requires a higher level of management oversight and coordination of activities for those shared resources. (POSITIVE)

Project communication was defined in a Program Level Communication Plan and generally went well. (POSITIVE)

ARUP processed two change requests and these went well. The process to request changes is mature in definition and execution. (POSITIVE)

A backup strategy was designed and executed for the build out and deployment related to the Procurement Library. This backup strategy has worked as designed and has enabled the State to respond to vendor requests for the Procurement Library that fell outside the initial expectations for this type of request. (POSITIVE)